

GETTING STARTED



The Financial Disclosure Management (FDM) application automates the confidential and public financial disclosure process allowing financial disclosure reports to be filed electronically. The product features financial disclosure report creation, submission and review that can be easily accessed through a secure website.

FDM is personalized to your FDM role. Specific Tab and Menu items display depending upon your FDM role. Assistants see the tabs related to the FDM user they are assisting.

Filers and Filer Assistants

Report List

The Reports List displays all the financial disclosure reports a filer has created. This page is the starting point where Filers and Filer Assistants begin creating financial disclosure reports or where filers would go to amend a report that is under review. If a Filer Assistant has more than one filer, they can select the filer through a drop-down list on the page.

FDM TRAIN Test System
Financial Disclosure Management

My Reports | My Info | Review Filers | Admin | Resources

Reports List

Welcome Training X. 450_1

Annual OGE 450 Reports are due 15 February.

To start a new OGE 450 report click "Add New Report".

My OGE 450 Reports

[Add New Report](#)

You currently have no reports.

Common Questions

- The OGE 450 reporting rules have been reduced. What are the changes?
- What are the reporting rules for the OGE 450?
- Glossary

Reviewers

ADAEAO, Senior Legal Counsel, Supervisor, Ethics Counselor,

SLC Assistant, Supervisor Assistant

Report List

The Reports List displays all the financial disclosure reports a filer has created. Review Filers | Reports List is where an FDM reviewer can view, end a review or eSign a financial disclosure report. This page also advises the reviewer if there are pending registrations.

FDM TRAIN Test System
Financial Disclosure Management

My Info | Review Filers | Admin | Resources

Reports List

Welcome Training X. Super_450_1

Annual OGE 450 Reports are due 15 February.

My OGE 450 Filer's Reports

Report Summary | Take OGE 450 Survey

Printer-Friendly

Form Type: My Role: Year: Reporting Status: Review Status:

OGE 450 | Supervisor | 2007 | ALL | ALL | Go | Reset

1 to 1 of 1 Items per page: 20 1

Filer	Registration Status	Year	Reporting Status	Review Status	Review Date	Signature Date
450_30 Training X.	Active	2007	New Entrant	Under Review (Amendment in Progress)	8/21/2007	View

Common Questions

- What does it mean to "End" a review?
- What does Amended mean?
- What does Amendment in Progress mean?
- How do I see the reports assigned to me if I have more than one role in FDM?
- What does Complete Report mean?
- Glossary

Security and Privacy Notice | Help | Accessibility | Developed by: C-E LCMC

My Info

My Assistants

The My Assistants page displays any Assistants that a Filer has selected. Assistants can be added and removed from this page.

FDM - Financial Disclosure Management

My Reports | My Info | Review Filers | Admin | Resources | Log Out

Contact Information | My Assistants | My Filers | My Profile

My Assistants

My OGE 450 Filer Assistants

Add Assistant

Burr_1, A X.	Remove
Ross_1, B X.	Remove

Common Questions

- What can an Assistant do?
- Who are the "Legal Reviewers in my review chain?"
- When would I need to allow Application Administrators to be my filer's assistants?
- Glossary

Contact Information

The Contact Information page contains a Filer's personal information. Information on this page can be updated and saved at any time. This page displays the first time a Filer logs into the system for editing and/or verification.

FDM - Financial Disclosure Management

My Reports | My Info | Resources | Log Out

Contact Information | My Assistants | My Profile

Contact Information

Last Name: [Knox_30]
First Name: [L]
Middle Initial: [M]
Agency: [Army]
Special Government Employee: ☐ No ☒ Yes
Filer Category: [Other]
Grade: [GS13] (Enter grade as 07, GS13, etc.)
Please provide your current Government Office address.
Address Line 1: [Add1]
Address Line 2: [Add2] (Optional)
City/Province: [CA]
State: [CA]
Country: [USA]

My Profile

The My Profile page displays the review chain and Assistants, if any, of the Filer. A Filer can change their Supervisor and Senior Legal Counsel on this page by clicking the Change button next to each role and follow the process.

FDM - Financial Disclosure Management

My Reports | My Info | Review Filers | Admin | Resources | Log Out

Contact Information | My Assistants | My Filers | My Profile

My Profile

Roles: Filer - OGE 450

Supervisor: Super_450_1, Training X. **Change**

Senior Legal Counsel: Slc_450_1, Training X. **Change**

OGE 450 Filer Assistants

My Info

My ECs

The My ECs page lists a Senior Legal Counsel's ethics counselors. From this page, Senior Legal Counsels have the ability to add or remove associated ethic's counselor.

FDM - Financial Disclosure Management

My Info | Review Filers | Admin | Resources | Log Out

Contact Information | My ECs | My Assistants | My Filers | My Profile

My Ethics Counselors

My ECs

Add EC

Roberts_1, R X.	Remove
Wagner_1, D X.	Remove

My Assistants

The My Assistants page displays any Assistants that a Supervisor or Senior Legal Counsel has selected. Assistants can be added and removed from this page.

FDM - Financial Disclosure Management

My Info | Review Filers | Admin | Resources | Log Out

Contact Information | My Assistants | My Filers | My Profile

My Assistants

My Supervisory Assistants

Add Assistant

450_1, Training X.	Remove
450_10, Training X.	Remove
450_11, Training X.	Remove
450_12, Training X.	Remove
450_13, Training X.	Remove
450_14, Training X.	Remove
450_15, Training X.	Remove
450_16, Training X.	Remove

My FILERS

The My Filers page displays filers if associated to a Supervisor, Senior Legal Counsel. From this page, you can:

- add a new Filer to FDM
- change a Filer's review chain
- change a Filer's role
- delete a filer if they have not submitted a financial disclosure report.

FDM - Financial Disclosure Management

My Info | Review Filers | Admin | Resources | Log Out

Contact Information | My Filers | My Assistants | My Profile

My Filers - Senior Legal Counsel View

Search Results

Last Name	First Name	Middle Name	Initials	E-Mail Address	Phone	Status
SLC_1	SLC_1			SLC_1@FDM.COM	202-123-4567	Active
SLC_2	SLC_2			SLC_2@FDM.COM	202-123-4567	Active
SLC_3	SLC_3			SLC_3@FDM.COM	202-123-4567	Active
SLC_4	SLC_4			SLC_4@FDM.COM	202-123-4567	Active
SLC_5	SLC_5			SLC_5@FDM.COM	202-123-4567	Active
SLC_6	SLC_6			SLC_6@FDM.COM	202-123-4567	Active
SLC_7	SLC_7			SLC_7@FDM.COM	202-123-4567	Active
SLC_8	SLC_8			SLC_8@FDM.COM	202-123-4567	Active
SLC_9	SLC_9			SLC_9@FDM.COM	202-123-4567	Active
SLC_10	SLC_10			SLC_10@FDM.COM	202-123-4567	Active
SLC_11	SLC_11			SLC_11@FDM.COM	202-123-4567	Active
SLC_12	SLC_12			SLC_12@FDM.COM	202-123-4567	Active
SLC_13	SLC_13			SLC_13@FDM.COM	202-123-4567	Active
SLC_14	SLC_14			SLC_14@FDM.COM	202-123-4567	Active
SLC_15	SLC_15			SLC_15@FDM.COM	202-123-4567	Active
SLC_16	SLC_16			SLC_16@FDM.COM	202-123-4567	Active

Report Data

Report Data is the main area used for preparing and reviewing a financial disclosure report. Filers and Filer Assistants can access Report Data by selecting **My Reports | Report List** and then clicking either **Add New Report** or by clicking either **View** or **Edit** beside an existing financial disclosure report. Reviewers and their Assistants or Ethics Counselors can access Report Data by selecting **My Filers | Report List** and then clicking **View** beside a financial disclosure report with the status of Under Review.

Other tabs within Report Data are:

Attachments	Within Attachments, a Filer can add, replace or delete attachments and Reviewers can view any associated attachments.
Comments	Within Comments, Filers and Reviewers can record their comments on a financial disclosure report. Filers can edit comments if the financial disclosure report has a draft status. Once a financial disclosure report has been submitted, comments can only be amended.
Flags	Within Flags, Filers and Reviewers can review any financial disclosure report flags, to note any missing or invalid information.
Audit Trail	The Audit Trail tracks and time stamps all changes made to the report.
View/Print	Within View/Print, a Filer or Reviewer can view and print a financial disclosure report, flags, comments, job description.
Review Status	Review Status page shows the progress of a financial disclosure report, which includes signing status, a list of assigned reviewers and their role as well as their review and signature date.

The screenshot displays the Financial Disclosure Management (FDM) web application. At the top, there's a navigation bar with tabs: My Reports, My Info, Review Filers, Admin, Resources. Below this is a sub-header for 'Financial Disclosure Management' and 'Financial Disclosure Management'. The main content area shows a progress bar with steps: Getting Started, Non-Investment Income, Assets, Liabilities, Outside Positions, Agreements, and Wrap Up. The 'Assets' step is currently active. Below the progress bar, there is a section for 'Assets and Investment Income' with instructions and a question: 'During the reporting period, did you, your spouse, or dependent children hold any reportable assets or receive any reportable investment income?'. The question has radio buttons for 'Yes' and 'No'. There are 'Back' and 'Continue' buttons at the bottom. A 'Common Questions' sidebar is visible on the right.

Admin

The Admin tab is used to add or edit FDM users. The sub-menu items that display under this tab are dependent upon the role(s) that have been assigned to an individual, i.e., if an individual is only a Supervisor within the system, then only the Supervisor and Pending sub-menu items display.

Filers

From this page, a Senior Legal Counsel, Senior Legal Counsel Assistant, Supervisor, and Supervisor Assistant can add, edit, delete and establish a Filer's review chain.

Supervisors

From this page, a Senior Legal Counsel, Senior Legal Counsel Assistant, Supervisor, and Supervisor Assistant can add, edit, and delete a Supervisor in FDM. In addition, a Senior Legal Counsel can also be established for the Supervisor and Filers can be reassigned on either a permanent or acting basis.

Senior Legal Counsel

From this page, a Senior Legal Counsel or Senior Legal Counsel Assistant can add or delete a Senior Legal Counsel within FDM. In addition, filers can be reassigned to another Senior Legal Counsel either on a permanent or an acting basis.

Pending

From this page a Senior Legal Counsel, Senior Legal Counsel Assistant, Supervisor, and Supervisor Assistant can view a list of self-registered Filers and either confirm, deny or edit the filer's registration within FDM.

User

From this page, Senior Legal Counsel, Senior Legal Counsel Assistant, Supervisor, and Supervisor Assistant can search for current FDM users and view the user's profile and the profiles of any other associated users.